
I Want to Set up Stored Bank Account Information

Slide notes

The California Employment Development Department (EDD) developed this tutorial to assist you with navigating through e-Services for Business. This tutorial will show you how to set up and store bank account information in e-Services for Business.

The screenshot displays the 'e-Services for Business' website for the State of California Employment Development Department. The browser address bar shows <https://eddservices.edd.ca.gov>. The page header includes the CA.gov logo and the department name. A navigation bar contains links for 'e-Services FAQs', 'e-Services Tutorials', 'Contact Payroll Taxes', and 'Employer Services Online'. The main content area is titled 'My Accounts' and shows a user profile for 'JOHN Q PUBLIC' with a red box around the 'View Profile' link. A dropdown menu titled 'I WANT TO...' is open, listing several options. Below the profile, there is a section for 'Employment Tax' showing a balance of 0.00 for a small business. The footer contains links for 'Contact EDD', 'Conditions of Use', 'Privacy Policy', 'Accessibility', and 'Site Map', along with a copyright notice for 2016.

Slide notes

We will begin at the e-Services for Business home page. Select “View Profile” under the “I Want To...” menu.

State of California
Employment Development Department

My Accounts » Profile

PROFILE

Web Name : John Public
Phone 1 : +1 9165551212
E-mail : JPublic@xxx.com
Question :

I WANT TO...
Cancel my Online Access

MY ACCOUNTS OTHER ACCOUNTS MANAGE LOGINS

Account Payment Sources Other Payment Options

Select "Setup"

MANAGE DEFAULT PAYMENT INFORMATION FOR EACH ACCOUNT

Name	Account ID	Account Type	Source Name	Payment Source
SMALL BUSINESS	XXX-XXXX-X	Employment Tax		Setup

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Slide notes

With the "My Accounts" tab and "Account Payment Sources" subtab already selected, select the "Setup" hyperlink. This is where you add, edit, and delete bank account information to make payments.

The screenshot shows a web browser window with the URL <https://eddservices.edd.ca.gov>. The page header includes the State of California Employment Development Department logo and navigation links: e-Services FAQs, e-Services Tutorials, Contact Payroll Taxes, and Employer Services Online. The user is logged in as 'You'. The main content area is titled 'Profile' and contains a 'Payment Source' form. The form is for a 'SMALL BUSINESS' with 'Employment Tax XXXX-XXXX-X'. The 'PAY TO THE ORDER OF' field is set to 'Employment Development Department'. The 'Source Name' field is highlighted with a red box and contains the text 'My Bank Account'. Below this are four required fields: 'Bank Account Type' (a dropdown menu), 'Routing Number', 'Account Number', and 'Confirm Account Number'. The 'Save' and 'Cancel' buttons are at the bottom right of the form.

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In the "Payment Source" window, enter a source name for the bank account. For this example we are going to name it "My EDD Employer Bank Account."

The screenshot displays the 'Profile' page on the EDD website. A modal window titled 'Payment Source' is open, showing a form for a 'SMALL BUSINESS' with 'Employment Tax XXX-XXXX-X'. The 'PAY TO THE ORDER OF' field is filled with 'Employment Development Department'. The 'Source Name' field has a dropdown menu with 'Checking' and 'Savings' options. The 'Routing Number', 'Account Number', and 'Confirm Account Number' fields are marked as 'Required'. The 'Save' and 'Cancel' buttons are located at the bottom right of the form.

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In the "Bank Account Type" field, use the drop down menu to select between "Checking" or "Savings."

The screenshot displays the EDD e-Services for Business interface. At the top, the browser address bar shows <https://eddservices.edd.ca.gov>. The page header features the CA.gov logo and the text "State of California Employment Development Department". A navigation bar includes links for "e-Services FAQs", "e-Services Tutorials", "Contact Payroll Taxes", and "Employer Services Online". The main content area is titled "Profile" and contains a "Payment Source" form. The form is for a "SMALL BUSINESS" with "Employment Tax XXX-XXXX-X". The "PAY TO THE ORDER OF" field is filled with "Employment Development Department". The "Source Name" field contains "My EDD Employer Bank Account". The "Bank Account Type" is set to "Checking". The "Routing Number", "Account Number", and "Confirm Account Number" fields are empty. A red callout box points to the "Save" button with the text "Select 'Save'".

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Then enter the correct routing number, account number, and then re-enter the account number in the "Confirm the Account Number" field. When completed, select "Save."

State of California
Employment Development Department

My Profile

e-Services FAQs e-Services Tutorials Contact Payroll Taxes Employer Services Online

My Accounts » Profile Remote Assistance Log Out

PROFILE

Web Name : John Public
Phone 1 : +1 9165551212
E-mail : JPublic@xxx.com
Question :

I WANT TO...
Cancel my Online Access

MY ACCOUNTS OTHER ACCOUNTS MANAGE LOGINS

Account Payment Sources Other Payment Options

MANAGE DEFAULT PAYMENT INFORMATION FOR EACH ACCOUNT Filter

Name	Account ID	Account Type	Source Name	Payment Source
SMALL BUSINESS	XXX-XXXX-X	Employment Tax	My EDD Employer Bank Ac	MIDDLEFIELD BANKING CO - 3456

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Slide notes

This stored payment information will now be the default payment source for all payments made within e-Services for Business. You will still have the option to manually enter payment information if you choose to use one different than the stored payment information. Select “My Accounts” to go back to the e-Services for Business home page.

Other Resources
www.edd.ca.gov

Taxpayer Assistance Center
1-888-745-3886

Slide notes

Thank you for taking the time to watch this tutorial on how to store payment information on e-Services for Business. Be sure to view our other tutorials demonstrating how to file a return, make a payment, and the many other actions available in e-Services for Business. Other resources are available at www.edd.ca.gov or by calling the Taxpayer Assistance Center at 1-888-745-3886.